A - Demographic Information Panels

The Demographic information panels are used in the participant folder view and Certification Guided Script to collect data for WIC participants. The panels are placed within a Folder Tab or a Dialog depending on the way the information is accessed.

A.1 Demographics Sub-tab

The Demographics sub-tab allows the user to view and update basic demographic information about the participant. It is invoked in response to the following user actions:

- Selection of the Demographics tab defined in *Chapter 09 - Participant Folder*.
- Selection of the Demographics sub-tab while the Demographics tab is active as defined in *Chapter 09 - Participant Folder*.
- Selection of the Demographics link or menu item on the Certification Guided Script window as defined in *Chapter 10 – Certification Guided Script*.

Figure 1 – Demographic Information Dialog – Demographic Sub-tab (Certification Guided Script)

Figure 2 - Demographics Tab - Demographics Sub-tab (Participant Folder)

A.1.1 Controls

This section describes the behavior of the controls on the Demographics sub-tab.

A.1.1.1 Last Name Text Box (Last)

The text box will be enabled when the Demographics sub-tab is active. Only characters A-Z, {space}, and the following characters ('., -) are allowed. It will convert all entered characters to upper case. The maximum size of this control will be twenty-five (25) characters.

A.1.1.2 First Name Text Box (First)

The text box will be enabled when the Demographics sub-tab is active. Only characters A-Z, {space}, and the following characters ('., -) are allowed. It will convert all entered characters to upper case. The maximum size of this control will be twenty (20) characters.

A.1.1.3 Middle Initial Text Box (MI)

The text box will be enabled when the Demographics sub-tab is active. The control will only accept entry of alpha characters. It will convert all entered characters to upper case. The maximum size of this control will be one (1) character.

A.1.1.4 Address Text Box (Address)

The text box will be enabled when the Demographics sub-tab is active. Only characters A-Z, 0-9, {space}, and the following characters ('. - # /) are allowed. It will convert all entered characters to upper case. The maximum size of this control will be fifty (50) characters.

A.1.1.5 County Dropdown

The Dropdown will be enabled when the Demographics sub-tab is active and a valid 2-character State code has been entered in the State masked edit box. The County dropdown will display a list of counties from the County entity for the user's state in alphabetic order. Upon a selection in the County dropdown the City dropdown will become enabled. Upon a change in county, the City dropdown will be cleared and remain enabled.

A.1.1.6 City Dropdown (City)

The Dropdown will be enabled when the Demographics sub-tab is active and a county is selected in the County dropdown. The dropdown displays a sub-set list of cities listed in the LocalMunicipality entity in alphabetic order sub-set by CountyCd.

A.1.1.7 State Masked Edit Box (State)

The masked edit box will be enabled when the Demographics sub-tab is active. It will only allow the entry of alpha characters. It will convert all entered characters to upper case. The mask for the box will be "AA" to allow entry of a State postal code. It will default to the value of your state. Upon a change in State the County and City dropdowns will become blank.

A.1.1.8 ZIP Code Masked Edit Box (ZIP)

The masked edit box will be enabled when the Demographics sub-tab is active. It will only allow the entry of numeric characters. The mask for the box will be "#####-####" to allow entry of a four digit ZIP extension.

Upon entering a value in the ZIP, if the ZIPCode is found in the CountyCityByZip entity and the following values are blank, the blank values will be automatically populated as follows:

- State masked edit box - the system will populate the State masked edit box with the CountyCityByZip.StateCD.
- County dropdown - the system will populate the County dropdown with the County.Name where CountyCityByZip.County = County.CountyCd
- City dropdown - the system will populate the City dropdown with the LocalMunicipality.Name where CountyCityByZip.County = LocalMunicipality.CountyCd and LocalMunicipality.LocalMunicipalityID

If a value exists for the State, County and City and the user enters or modifies the ZIP, the system will not overwrite the previous entry/selection.

Upon entering a value in the ZIP, if the ZIP code is not found in the CountyCityByZip entity, the system will bypass the automatic update process.

A.1.1.9 Email Address Text Box

The Email Address text box will be enabled when the demographics tab is active. Characteristics for the Email Address are defined in *Consistencies*

A.1.1.10 Date of Birth Masked Edit Box (DOB)

The masked edit box will be enabled when the Demographics sub-tab is active. It will only allow the entry of numeric characters. The mask for the box will be "##/##/####".

A.1.1.11 WIC Category Dropdown

The Dropdown will be enabled when the Demographics sub-tab is active. The Dropdown will display a list of WIC Categories from the WICStatus entity in alphabetic order.

When the WIC Category specified for the participant in the WIC Category Dropdown is Pregnant; Breastfeeding; or Non-Breastfeeding, the system will automatically select 'Female' in the Gender Dropdown and disable the Gender Dropdown.

If the participant has not been certified changes to the WIC Category dropdown can be made.

If the participant has been previously certified but is not in a valid certification period, only the following WIC Category changes may be made:

- Infant may be changed to Child (subject to age verification)
- Breastfeeding may be changed to Non-breastfeeding
- Non-breastfeeding may be changed to Breastfeeding

If the WIC Category for a Pregnant participant is changed to post-partum or a post-partum participant WIC Category is changed to Pregnant the system will invoke a message "The participants WIC Category cannot be changed in this manner. A new certification will need to be completed."

Additional edits are performed for the WIC Category dropdown within the Certification Guided Script. The dropdown will be enabled when the Demographics sub-tab is active, but will not allow the user to change its value selected for a Pregnant, Breastfeeding or Non-breastfeeding participant. *IsNewPregnancyDefaults = 'Y'*

A.1.1.12 Gender Dropdown

The Dropdown will be enabled when the value of the WIC Category Dropdown is Infant or Child. The list will display all ReferenceDictionary.Description listed in the ReferenceDictionary entity where the ReferenceDictionary.Category = 'Gender'. The list will display in alphabetic order

If the value selected in the WIC Category dropdown is Pregnant; Breastfeeding; or Non-Breastfeeding, the value will default to 'Female' and the dropdown will be disabled.

A.1.1.13 Mailing Address Same as Residence Button (Same as Residence)

The Mailing Address Same as Residence button will be visible in the participant folder view in the Clinic application if the participant is not in an incomplete certification.

The Mailing Address Same as Residence button will always be available in the Certification Guided Script.

The Mailing Address Same as Residence button is not visible when the participant folder is invoked in the Central Administrative Site or State Office applications

A.1.1.14 Copy Residence Address to Mailing Address

Upon selection of the Mailing Address Same as Residence button, the system will copy the value of the Residence Address text box to the Mailing Address text box, the value of the Residence City Dropdown to the Mailing City text box, and the value of the Residence ZIP Code masked edit box to the Mailing ZIP Code masked edit box.

A.1.1.15 Mailing Address Text Box (Address)

The text box will be enabled when the Demographics sub-tab is active. Only characters A-Z, 0-9, {space}, and the following characters (**' . - # /**) are allowed. It will convert all entered characters to upper case. The maximum size of this control will be fifty (50) characters.

A.1.1.16 Mailing City Text Box (City)

The text box will be enabled when the Demographics sub-tab is active. Only characters A-Z, {space}, and the following characters (**' . , -**) are allowed. It will convert all entered characters to upper case. The maximum size of this control will be twenty (20) characters.

A.1.1.17 Mailing State Masked Edit Box (State)

The masked edit box will be enabled when the Demographics sub-tab is active. It will only allow the entry of alpha characters. It will convert all entered characters to upper case. The mask for the box will be "AA" to allow entry of a State postal code. It will default to the value of your state.

A.1.1.18 Mailing ZIP Code Masked Edit Box (ZIP)

The masked edit box will be enabled when the Demographics sub-tab is active. It will only allow the entry of numeric characters. The mask for the box will be "#####-####" to allow entry of a four digit ZIP extension, if known.

A complete five digit ZIP code is required. If any part of the four-digit extension is entered, the entire extension is required.

A.1.1.19 Copy Demographics From Another Household Member button (Copy Demographics)

The Copy Demographics From Another Household Member button will be visible in the participant folder view of the Clinic Application if the participant is not in an incomplete certification.

The Copy Demographics From Another Household Member button will always be available in the Certification Guided Script.

The Copy Demographics From Another Household Member button is not visible when the participant folder is invoked in the Central Administrative Site or State Office applications.

A.1.1.20 Race/Ethnicity Button

The Race/Ethnicity button will be enabled when the Demographics sub-tab is active.

A.1.1.21 Social Security Number

The masked edit box will be enabled when the Demographics sub-tab is active. It will only allow the entry of numeric characters. The mask for the box will be "###-##-###".

A.1.1.22 Homeless Check Box

The check box will be enabled when the Demographics sub-tab is active.

When the Homeless check box is checked

- The Homeless Verified Date masked edit box will become enabled
- The Homeless Verified Date masked edit box will be populated with the current system date.
- The Fixed Nighttime Location Dropdown will become enabled.

When the Homeless check box is un-checked:

- The Homeless Verified Date masked edit box will become disabled
- The Homeless Verified Date masked edit box will be emptied.

- The Fixed Nighttime Location Dropdown will become disabled

A.1.1.23 Homeless Verified Date Masked Edit Box

The Homeless Verified Date Masked Edit Box is enabled when the Demographics sub-tab is active and the Homeless check box is checked. When enabled, it will be populated with the current system date. It will only allow the entry of numeric characters. The mask for the box will be "##/##/####".

A.1.1.24 Fixed Nighttime Location Dropdown

The Fixed Nighttime Location Dropdown is enabled when the Demographics sub-tab is active and the Homeless check box is checked. It will display all FIXEDLOCATIONDESC from the FIXEDLOCATION table in alphabetic order.

Entry is allowed in this control. Only characters A-Z, 0-9, {space}, and the following characters (' . - # /) are allowed. It will convert all entered characters to upper case. The maximum size of this control will be 30 characters. An entry may be selected from the list or typed directly into the Dropdown.

When the description entered matches and existing value, the system will invoke a standard error with the text, "Value already exists." Otherwise, upon saving demographic information, the new value will be added to the FIXEDLOCATION entity.

A.1.1.25 Residency Proof Dropdown

The Dropdown will be enabled when the Demographics sub-tab is active. It will display all ReferenceDictionary.Description listed in the ReferenceDictionary entity where the ReferenceDictionary.Category = 'RESIDPROOF" in alphabetic order.

A.1.1.26 ID Proof Dropdown

The Dropdown will be enabled when the Demographics sub-tab is active.

If the Member.WICStatus is Infant or Child, the list will display all ReferenceDictionary.Description listed in the ReferenceDictionary entity where the ReferenceDictionary.Category = 'IDPRFCHILD' in alphabetic order.

If the Member.WICStatus is Pregnant, Breastfeeding or Non-breastfeeding, the list will display all ReferenceDictionary.Description listed in the ReferenceDictionary entity where the ReferenceDictionary.Category = 'IDPRFWOMAN' in alphabetic order.

A.1.1.27 Telephone 1 Masked Edit Box

The masked edit box will be enabled when the dialog is active. It will only allow the entry of numeric characters. The mask for the box will be "###-###-####" to allow entry of an area code and seven digit telephone number. The area code portion of this box will default from the established Clinic defaults.

A.1.1.28 Telephone 1 Comment Text Box (Comment)

The text box will be enabled when the Demographics sub-tab is active. The control will accept entry of alphanumeric and special characters. The maximum size of this control will be thirty (30) characters.

A.1.1.29 Telephone 2 Masked Edit Box

The masked edit box will be enabled when the Demographics sub-tab is active. It will only allow the entry of numeric characters. The mask for the box will be "###-###-####" to allow entry of an area code and seven digit telephone number. The area code portion of this box will default from the established Clinic defaults.

A.1.1.30 Telephone 2 Comment Text Box (Comment)

The text box will be enabled when the Demographics sub-tab is active. The control will accept entry of alphanumeric and special characters. The maximum size of this control will be thirty (30) characters.

A.1.1.31 Maiden Last Name Text Box (Last)

The text box will be enabled when the Demographics sub-tab is active and the participant is a woman. Only characters A-Z, {space}, and the following characters (' . , -) are allowed. The maximum size of this control will be twenty-five (25) characters.

A.1.1.32 Maiden First Name Text Box (First)

The text box will be enabled when the Demographics sub-tab is active and the participant is a woman. Only characters A-Z, {space}, and the following characters (' . , -) are allowed. The maximum size of this control will be twenty (20) characters.

A.1.1.33 Maiden Middle Initial Text Box (MI)

The text box will be enabled when the Demographics sub-tab is active and the participant is a woman. The control will only accept entry of alpha characters. The maximum size of this control will be one (1) character.

A.1.1.34 Physically Present Radio Button Group

The radio button group will be **enabled** only when the <u>Demographics Information dialog</u> is active during Certification Guided Script and the *PhysicallyPresent* business rule is set to "Y" (Yes). The radio group will default to blank.

The radio button group will be **disabled** when the <u>Demographics sub-tab</u> is active in the Participant Folder or the <u>Demographics Information dialog</u> is active during Certification Guided Script and the *PhysicallyPresent* business rule is set to "N" (No). It will be populated with the value selected during the certification process.

A.1.1.35 Reason Not Present Dropdown

The Reason Not Present Dropdown is **enabled** when the Demographics sub-tab is active during Certification Guided Script and the No radio button is selected in the Physically Present Radio Button group.

It will display all ReferenceDictionary.Description listed in the ReferenceDictionary entity where the ReferenceDictionary.Category = 'REASONNOTPRESENT' in alphabetic order.

The dropdown will be **disabled** when the Demographics sub-tab is active during Certification Guided Script and the Yes radio button is selected in the Physically Present Radio Button group.

The dropdown will be **disabled** when the <u>Demographics sub-tab</u> is active in the Participant Folder. It will be populated with the value selected during the certification process.

A.1.1.36 Migrant Check Box

The check box will be enabled when the Demographics sub-tab is active.

A.1.1.37 Living with Foster Parent(s) Check Box

The check box will be enabled when the Demographics sub-tab is active regardless of the value selected in the WIC Category dropdown. It has an initial value of cleared.

A.1.1.38 Clinic Assigned Dropdown

The Dropdown will be disabled when the Demographics sub-tab is active. It will display the Clinic of the currently logged in user.

A.1.1.39 Staff Member Dropdown

The Dropdown will be enabled when the Demographics sub-tab is active and at least one staff member has been established for the Clinic. It will display a sub-set list of defined staff members for the Location in alphabetic order.

A.1.2 Processes

A.1.2.1 Initializing the Interface – (Demographics Sub-tab)

The Demographics sub-tab will be initially displayed 'on-top'.

The system will verify if there is a certification in progress. If at least one certification is started and not completed, the controls on **all Demographic sub-tabs** (Demographics sub-tab, Additional Info 1 sub-tab and Additional Info 2 sub-tab) are locked when active in the Participant Folder and updating is not allowed until the Certification has been completed. This will apply if a record exists in the CertContact entity and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

A.1.2.2 Displaying the Data – (Demographics Sub-tab)

The controls will display previously saved data as defined in the Demographic Information Data Map.

A.1.2.3 Edits (Demographics Sub-Tab – Participant Folder)

Edits for the controls are performed upon exit from the Demographics Tab, and are not performed when switching among the sub-tabs within the Demographics Panels. The edits for the controls of each sub-tab are described in the respective section for the sub-tab

Upon exiting the Demographics tab within the participant folder (see Edits (Participant Folder) in *Chapter 09 – Participant Folder*), if the Homeless check box is checked, and an entry has not been made in the Homeless Verified Date, the system will invoke a standard error message "An entry is required for the {control label}".

If the entry made in the Homeless Verified Date is greater than the system date, the system will invoke a standard error message "Homeless Verified Date must be less than or equal to the system date."

If the entry made in the Homeless Verified Date is equal to 30 days prior to the system date, the system will invoke a standard error message "Homeless Verified Date must not be 30 days prior to the current date."

If the Homeless check box is checked, and a selection has not been made in the Fixed Nighttime Location dropdown, the system will invoke a standard error message "A selection is required for the {control label}".

If the Homeless check box is checked an entry is not required for Proof of Residency.

If the value of the WIC Category is changed:

- If the applicant has not yet been certified for WIC benefits, the WIC Category may be changed to any category to correct keying errors.
- When the participant is currently in a valid certification period, only the following WIC Category changes may be made:
  - Infant may changed to Child (subject to age validation)
  - Breastfeeding may be changed to Non-breastfeeding
  - Non-breastfeeding may be changed to Breastfeeding
- When an Infant is changed to a Child the system will perform the following actions:
  - The system will create a pseudo-certification record for the child and record the system date as the start of certification. The end of certification will remain from the previous certification.
  - All risk factors assigned during the initial certification will be moved to the child record what is created.
  - The priority will be updated from the infant priority to the equivalent child priority.
  - The system will assign the child the standard food package for a one year old.
  - When the calculated priority is not currently being served by the state because of a waiting list situation, the child will be terminated from the current certification with a reason of "Placed on Waiting List".
- When the category of a woman is changed from Breastfeeding to Non-breastfeeding, the system will perform the following actions:
  - Any enhanced breastfeeding food items will be removed from the current and future food prescriptions for the woman.
  - The quantities for the food prescription will be reduced to the maximum levels for a non-breastfeeding woman, if necessary.
  - The system will create a pseudo-certification record for the woman that records the system date as the start of certification. The end of certification will be six (6) months from the actual delivery date of the infant.

- o Risk factors from the prior certification record that are valid for a non-breastfeeding woman will be copied from the previous certification to the new pseudo-certification record. The highest priority of the copied risk factors will determine the new priority for the woman.
- o The system will automatically invoke a standard message dialog with the text "The infant formula prescription should be reassessed by the CPA."
- o When the calculated priority is not currently being served by the state because of a waiting list situation, the woman will be terminated from the current certification with a reason of "Placed on Waiting List".

- When the category of a woman is changed from Breastfeeding to Non-breastfeeding and back to Breastfeeding, the system will perform the following actions:
  - o The system will create a pseudo-certification record for the woman and will record the system date as the start of that certification. The end of that certification will be the end date from the previous Breastfeeding certification.
  - o Any risk factors from the original Breastfeeding certification will be copied to the new pseudo-certification record. The original priority of the Breastfeeding certification will be the new priority for the woman.
  - o When the calculated priority is not currently being served by the State because of a waiting list situation, the woman will be terminated from the current certification with a reason of "Placed on Waiting List".

- If an entry or selection is not made in any of the following fields for the all sub-tabs of the Demographics panel:(note: If the applicant has not yet been certified for WIC benefits these edits do not apply):
  - o Last Name text box
  - o First Name text box
  - o Address text box
  - o County Dropdown
  - o City Dropdown
  - o State text box
  - o ZIP Code masked edit box
  - o Mailing Address text box
  - o Mailing City text box
  - o Mailing State text box
  - o Mailing ZIP Code masked edit box
  - o Residency Proof Dropdown
  - o ID Proof Dropdown
  - o Date of Birth masked edit box
  - o WIC Category Dropdown
  - o Gender Dropdown
  - o Race/Ethnicity Dropdown
  - o Staff Member Dropdown

The system will invoke a standard error message for a text box with the text "An entry is required for the {control label}".

The system will invoke a standard error message for a dropdown with the text "A selection is required in the {control label}".

If an invalid value is entered in the State, the system invokes a standard error message with the text, "The entry for (control label} is invalid."

If a value is entered in the Telephone 1 and/or Telephone 2 masked edit boxes but not a complete a 10-digit telephone number, the system invokes a standard error message with the text, "The entry for (control label} is invalid."

When a value is entered into the ZIP Code and the Mailing ZIP Code masked edit boxes, but not a complete 5-digit or 9-digit ZIP code, the system invokes a standard error message with the text, "(control label} is invalid."

If the value of the Date of Birth masked edit box is invalid for the age of the selected WIC Category using the Age Definition Table, the system invokes a standard error message with the text, "Date of Birth is invalid for a (an) {WIC Category}"

A.1.2.3.1 Age Definition Table

Valid ages for WIC Categories are as follows:

WIC Category	Minimum Date	Maximum Date
Infant	current system date	364 days previous to current system date (365 if spanning a leap year)
Child	one (1) year previous to current system date	Value set for State Business Rule 'MaximumChildAge' previous to current system date
Pregnant	Value set for State Business Rule 'MinimumWomanAge' previous to current system date	Value set for State Business Rule 'MaximumWomanAge' previous to current system date
Breastfeeding	Value set for State Business Rule 'MinimumWomanAge' previous to current system date	Value set for State Business Rule 'MaximumWomanAge' previous to current system date
Non-breastfeeding	Value set for State Business Rule 'MinimumWomanAge' previous to current system date	Value set for State Business Rule 'MaximumWomanAge' previous to current system date

A.1.2.4 Warn of Ineligibility

Participants are determined to be ineligible in the Certification Guided Script if the following occurs:

- If the selection "Not a resident of {your state}" (key value "J") is selected in the Residency Proof dropdown, the system will display the Mark Applicant as Ineligible dialog as defined in *Chapter 10 – Certification Guided Script.*
- If the applicant is determined to be ineligible (categorically, income, or residency) based on the demographic information entered on the Demographic Information dialog, the system will invoke the Mark Applicant as Ineligible dialog.

A.1.2.5 Saving the Data

Upon successful completion of the above-listed edits, the system will save the values for all Demographic sub-tabs to the database (see Demographic Information Data Map).

A.1.2.6 Assign Risk Factors

After the values on the Demographic sub-tabs are saved, if the *AssignRisksOutsideCert* business rule is active the system will invoke the Assign Risk Factors (Process) described in *Chapter 09 - Participant Folder*.

A.1.2.7 Copy Demographics From Another Household Member

Upon selection of the Copy Demographics button the system will invoke the Copy Demographics From Another Household Member dialog as described in this document.

A.1.2.8 Race/Ethnicity Button

Upon selection of the Race/Ethnicity button the system will invoke the Race/Ethnicity dialog as described in this document.

A.2 Additional Info 1 Sub-tab

The Additional Info 1 sub-tab of the Demographics panel contains additional information about the participant. It is invoked when the user selects the Additional Info 1 sub-tab while the Demographics panel is active.

Figure 3 - Demographics - Additional Info 1 Sub-tab (Participant Folder)

Figure 4 - Demographics - Additional Info 1 Sub-tab (Certification Guided Script)

A.2.1 Controls

A.2.1.1 Household Smoking Dropdown

The dropdown will be enabled when the Additional Info 1 sub-tab is active and the participant has a previous certification. It will display all ReferenceDictionary.Description listed in the ReferenceDictionary entity where the ReferenceDictionary.Category = 'HOUSEHOLDSMOKE' in alphabetic order..

It will be initially blank. Each time a certification is started the value will be blank and re-entry will be required.

A.2.1.2 TV/Video Viewing Dropdown

The dropdown will be enabled when the Additional Info 1 sub-tab is active and the child is two (2) years or older as of the current system date. It will display all ReferenceDictionary.Description listed in the ReferenceDictionary entity where the ReferenceDictionary.Category = 'TVVIDEOAMOUNT' in numeric/alphabetic order. It will be initially blank.

It will be initially blank. Each time a certification is started the value will be blank and re-entry will be required.

A.2.1.3 Local Question 1 Value Label

The value label will display when a local question has been marked as active for the 1st position. It will display with the value of the description established in the LOCAL-USE-CAPTION entity for the 1st position for that WIC Category.

A.2.1.4 Local Answer 1 Dropdown

The Dropdown will be enabled when a local question has been marked as active for the 1st position. It will contain the values established for that local question in the LOCAL-USE-CODE entity the local question in the 1st position in alphabetic order.. It will default to the value associated with the VALUE-ID attribute of the MEMBER-OTH-INFO entity, which also updates the LOCAL-SURVEY-ANSWER entity for that date for the local question in the 1st position.

A.2.1.5 Local Question 2 Value Label

The value label will display when a local question has been marked as active for the 2nd position. It will display with the value of the description established in the LOCAL-USE-CAPTION entity for the 2nd position for that WIC Category.

A.2.1.6 Local Answer 2 Dropdown

The Dropdown will be enabled when a local question has been marked as active for the 2nd position. It will contain the values established for that local question in the LOCAL-USE-CODE entity the local question in the 2nd position in alphabetic order.. It will default to the value associated with the VALUE-ID attribute of the MEMBER-OTH-INFO entity, which also updates the LOCAL-SURVEY-ANSWER entity for that date for the local question in the 2nd position.

A.2.1.7 Local Question 3 Value Label

The value label will display when a local question has been marked as active for the 3rd position. It will display with the value of the description established in the LOCAL-USE-CAPTION entity for the 3rd position for that WIC Category.

A.2.1.8 Local Answer 3 Dropdown

The Dropdown will be enabled when a local question has been marked as active for the 3rd position. It will contain the values established for that local question in the LOCAL-USE-CODE entity the local question in the 3rd position in alphabetic order.. It will default to the value associated with the VALUE-ID attribute of the MEMBER-OTH-INFO entity, which also updates the LOCAL-SURVEY-ANSWER entity for that date for the local question in the 3rd position.

A.2.1.9 Local Question 4 Value Label

The value label will display when a local question has been marked as active for the 4th position. It will display with the value of the description established in the LOCAL-USE-CAPTION entity for the 4th position for that WIC Category.

A.2.1.10 Local Answer 4 Dropdown

The Dropdown will be enabled when a local question has been marked as active for the 4th position. It will contain the values established for that local question in the LOCAL-USE-CODE entity the local question in the 4th position in alphabetic order. It will default to the value associated with the VALUE-ID attribute of the MEMBER-OTH-INFO entity, which also updates the LOCAL-SURVEY-ANSWER entity for that date for the local question in the 4th position.

A.2.1.11 Local Question 5 Value Label

The value label will display when a local question has been marked as active for the 5th position. It will display with the value of the description established in the LOCAL-USE-CAPTION entity for the 5th position for that WIC Category.

A.2.1.12 Local Answer 5 Dropdown

The Dropdown will be enabled when a local question has been marked as active for the 5th position. It will contain the values established for that local question in the LOCAL-USE-CODE entity the local question in the 5th position in alphabetic order.. It will default to the value associated with the VALUE-ID attribute of the MEMBER-OTH-INFO entity, which also updates the LOCAL-SURVEY-ANSWER entity for that date for the local question in the 5th position.

A.2.1.13 Local Question 6 Value Label

The value label will display when a local question has been marked as active for the 6th position. It will display with the value of the description established in the LOCAL-USE-CAPTION entity for the 6th position for that WIC Category.

A.2.1.14 Local Answer 6 Dropdown

The Dropdown will be enabled when a local question has been marked as active for the 6th position. It will contain the values established for that local question in the LOCAL-USE-CODE entity the local question in the 6th position in alphabetic order.. It will default to the value associated with the VALUE-ID attribute of the MEMBER-OTH-INFO entity, which also updates the LOCAL-SURVEY-ANSWER entity for that date for the local question in the 6th position.

A.2.1.15 State Question 1 Value Label

The value label will display when a state question has been marked as active for the 1st position. It will display with the value of the description established in the STATE-USE-CAPTION entity the 1st position.

A.2.1.16 State Answer 1 Dropdown

The Dropdown will be enabled when a state question has been marked as active for the 1st position. It will contain the values established for that local question in the STATE-USE-CODE entity the local question in the 1st position in alphabetic order.. It will default to the value associated with the VALUE-ID attribute of the MEMBER-OTH-INFO entity, which also updates the STATE -SURVEY-ANSWER entity for that date for the local question in the 1st position.

A.2.1.17 State Question 2 Value Label

The value label will display when a state question has been marked as active for the 2nd position. It will display with the value of the description established in the STATE-USE-CAPTION entity the 2nd position.

A.2.1.18 State Answer 2 Dropdown

The Dropdown will be enabled when a state question has been marked as active for the 2nd position. It will contain the values established for that local question in the STATE-USE-CODE entity the local question in the 2nd position in alphabetic order. It will default to the value associated with the VALUE-ID attribute of the MEMBER-OTH-INFO entity, which also updates the STATE -SURVEY-ANSWER entity for that date for the local question in the 2nd position.

A.2.1.19 State Question 3 Value Label

The value label will display when a state question has been marked as active for the 3rd position. It will display with the value of the description established in the STATE-USE-CAPTION entity the 3rd position.

A.2.1.20 State Answer 3 Dropdown

The Dropdown will be enabled when a state question has been marked as active for the 3rd position. It will contain the values established for that local question in the STATE-USE-CODE entity the local question in the 3rd position in alphabetic order. It will default to the value associated with the VALUE-ID attribute of the MEMBER-OTH-INFO entity, which also updates the STATE -SURVEY-ANSWER entity for that date for the local question in the 3rd position.

A.2.1.21 State Question 4 Value Label

The value label will display when a state question has been marked as active for the 4th position. It will display with the value of the description established in the STATE-USE-CAPTION entity the 4th position.

A.2.1.22 State Answer 4 Dropdown

The Dropdown will be enabled when a state question has been marked as active for the 4th position. It will contain the values established for that local question in the STATE-USE-CODE entity the local question in the 4th position in alphabetic order. It will default to the value associated with the VALUE-ID attribute of the MEMBER-OTH-INFO entity, which also updates the STATE -SURVEY-ANSWER entity for that date for the local question in the 4th position.

A.2.1.23 State Question 5 Value Label

The value label will display when a state question has been marked as active for the 5th position. It will display with the value of the description established in the STATE-USE-CAPTION entity the 5th position.

A.2.1.24 State Answer 5 Dropdown

The Dropdown will be enabled when a state question has been marked as active for the 5th position. It will contain the values established for that local question in the STATE-USE-CODE entity the local question in the 5th position in alphabetic order. It will default to the value associated with the VALUE-ID attribute of the MEMBER-OTH-INFO entity, which also updates the STATE -SURVEY-ANSWER entity for that date for the local question in the 5th position.

A.2.1.25 State Question 6 Value Label

The value label will display when a state question has been marked as active for the 6th position. It will display with the value of the description established in the STATE-USE-CAPTION entity the 6th position.

A.2.1.26 State Answer 6 Dropdown

The Dropdown will be enabled when a state question has been marked as active for the 6th position. It will contain the values established for that local question in the STATE-USE-CODE entity the local question in the 6th position in alphabetic order. It will default to the value associated with the VALUE-ID attribute of the MEMBER-OTH-INFO entity, which also updates the STATE -SURVEY-ANSWER entity for that date for the local question in the 6th position.

A.2.1.27 How Heard about WIC Dropdown

The Dropdown will be enabled when the Additional Info 1 sub-tab is active. It will display all ReferenceDictionary.DESCRIPTION where the ReferenceDictionary.CATEGORY = 'HOWHEARD' in alphabetic order.

A.2.1.28 Hardship List Box

The list box will be enabled when the Additional Info 1 sub-tab is active. The user may make multiple selections. The list will contain the following entries:

- Child Care Problems
- Chronic Family Illness
- Other
- Rural Residence
- Transportation
- Working Authorized Representative

The list will default to no entries selected.

A.2.1.29 Disability Dropdown

The Dropdown will be enabled when the Additional Info 1 sub-tab is active. It will display all ReferenceDictionary.DESCRIPTION where the ReferenceDictionary.CATEGORY = 'DISIBILITY' in alphabetic order.. The Dropdown will initially be blank.

A.2.1.30 Insurance Type Dropdown

The Dropdown will be enabled when the Additional Info 1 sub-tab is active. It will display all ReferenceDictionary.DESCRIPTION where the ReferenceDictionary.CATEGORY = 'INSTYPE' in alphabetic order.. It will initially be blank.

A.2.1.31 Type of Medical Home Dropdown

The Dropdown will be enabled when the Additional Info 1 sub-tab is active. It will display all ReferenceDictionary.DESCRIPTION where the ReferenceDictionary.CATEGORY = 'TYPEMEDHOME' in alphabetic order. It will initially be blank.

A.2.1.32 Medical Home Dropdown

The Dropdown will be enabled when the Additional Info 1 sub-tab is active and the State Business Rule 'CAPTUREMEDHOME' equals 'Y". It will display all values listed in the MEDICALHOMENAME from the MedicalHome table in alphabetic order.

A.2.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Additional Info 1 sub-tab.

A.2.2.1 Initializing the Interface

All fields will display previously saved data as defined in the
Demographic Information Data Map.

A.2.2.2 Edits (Additional Info 1 Sub-tab)

The edits for Additional Info 1 Sub-tab are the same in the Participant Folder and in Certification Guided Script. The edits for the controls are performed upon exit from the dialog or tab, and are not performed when switching among the sub-tabs.

As part of the edit process for the entire Demographics panels, the system will check that an entry is made in the following controls on the Additional Information 1 sub-tab:

- Household Smoking
- TV/Video Viewing (if enabled)
- How Heard about WIC Dropdown
- Type of Medical Home Dropdown (if applicable to your state)
- Medical Home Dropdown (if applicable to your state)

If an entry is not made in an above-listed control, the system will invoke a standard error message with the text "An entry is required for the {control label}".

A.2.2.3 Saving the Data

Upon successful completion of the above-listed edits, the system will save the values for all Demographic sub-tabs to the database (see Demographic Information Data Map).

A.3 Additional Info 2 Sub-tab

The Additional Info 2 sub-tab of the Demographics panel contains more information for the participant. It is invoked when the user selects the Additional Info 2 sub-tab while the Demographics panel is active.

Figure 5 - Demographics Panel – Additional Info 2 Sub-tab (Infant/Child) (Participant Folder)

Figure 6 - Demographics Panel – Additional Info 2 Sub-tab (Woman) (Participant Folder)

Figure 7- Demographics Dialog – Additional Info 2 Sub-tab (Infant/Child) (Certification Guided Script)

Figure 8- Demographics Dialog – Additional Info 2 Sub-tab (Woman) (Certification Guided Script)

A.3.1 Controls

A.3.1.1 Need Interpreter Check Box

The check box will be enabled when the Additional Info 2 sub-tab is active. It will initially be blank.

A.3.1.2 Correspondence Preference Dropdown

The Dropdown will be enabled when the Additional Info 2 sub-tab is active. It will display all ReferenceDictionary.Description (an entry for 'English' and ' Spanish') where the ReferenceDictionary.CATEGORY = 'DOCMNTLANG in alphabetic order'. The Dropdown will display the previously saved value.

A.3.1.3 Language 1 Dropdown

The Dropdown will be enabled when the Additional Info 2 sub-tab is active. It will display all ReferenceDictionary.DESCRIPTION where the ReferenceDictionary.CATEGORY = 'LANGUAGE' in alphabetic order. The Dropdown will default to the default language specified for the Clinic at which the participant was added to the database.

A.3.1.4 Language 1 Read Check Box (Read)

The check box will be enabled when the Additional Info 2 sub-tab is active. It will initially be marked.

A.3.1.5 Language 1 Spoken Check Box (Spoken)

The check box will be enabled when the Additional Info 2 sub-tab is active. It will initially be marked.

A.3.1.6 Language 2 Dropdown

The Dropdown will be enabled when the Additional Info 2 sub-tab is active. It will display all ReferenceDictionary.DESCRIPTION where the ReferenceDictionary.CATEGORY = 'LANGUAGE' in alphabetic order. It will initially be blank.

A.3.1.7 Language 2 Read Check Box (Read)

The check box will be enabled when the secondary language is selected in the Language 2 Dropdown. It will initially be cleared.

A.3.1.8 Language 2 Spoken Check Box (Spoken)

The check box will be enabled when the secondary language is selected in the Language 2 Dropdown. It will initially be cleared.

A.3.1.9 Marital Status Dropdown

The Dropdown will be enabled when the Additional Info 2 sub-tab is active. It will display all ReferenceDictionary.DESCRIPTION where the ReferenceDictionary.CATEGORY = 'MARITALSTS' in alphabetic order. It will initially be blank.

A.3.1.10 Education Level Dropdown

The Dropdown will be enabled when the Additional Info 2 sub-tab is active. It will display all ReferenceDictionary.DESCRIPTION where the ReferenceDictionary.CATEGORY = 'EDULEVEL' in alphabetic order. It will initially be blank.

A.3.1.11 Register to Vote Dropdown

The Dropdown will be enabled when the Additional Info 2 sub-tab is active and the participant is 18 years old or older. It will display all ReferenceDictionary.DESCRIPTION where the ReferenceDictionary.CATEGORY = 'REGISTERTOVOTE' in alphabetic order. It will initially be blank.

A.3.1.12 Authorized Representative Last Name Text Box (Last)

The text box will be enabled when the Additional Info 2 sub-tab is active. The control will only accept entry of alpha and the following and the following characters **(' , . -)**. The maximum size of this control will be twenty-five (25) characters. It will default to the last name of the woman for participants with a WIC Category of Pregnant, Breastfeeding or Non-breastfeeding. It will default to blank for participants with a WIC Category of Infant or Child.

A.3.1.13 Authorized Representative First Name Text Box (First)

The text box will be enabled when the Additional Info 2 sub-tab is active. The control will only accept entry of alpha and the following characters **(' , . -)**. The maximum size of this control will be twenty (20) characters. It will default to the first name of the woman for Pregnant, Breastfeeding, or Non-breastfeeding category or blank for Infant or Child category. It will default to blank for participants with a WIC Category of Infant or Child.

A.3.1.14 Authorized Representative Middle Initial Text Box (MI)

The text box will be enabled when the Additional Info 2 sub-tab is active. The control will only accept entry of alpha characters. The maximum size of this control will be one (1) character. It will default to the middle initial of the woman for participants with a WIC Category of Pregnant, Breastfeeding, or Non-breastfeeding. It will default to blank for participants with a WIC Category of Infant or Child.

A.3.1.15 Authorized Representative/Proxy 1 Last Name Text Box (Last)

The text box will be enabled when the Additional Info 2 sub-tab is active. The control will only accept entry of alpha and the following characters **(' , . -)**. The maximum size of this control will be twenty-five (25) characters. It will initially be blank.

A.3.1.16 Authorized Representative/Proxy 1 First Name Text Box (First)

The text box will be enabled when the Additional Info 2 sub-tab is active. The control will only accept entry of alpha and the following characters **(' , . -)**. The maximum size of this control will be twenty (20) characters. It will initially be blank.

A.3.1.17 Authorized Representative/Proxy 1 Middle Initial Text Box (MI)

The text box will be enabled when the Additional Info 2 sub-tab is active. The control will only accept entry of alpha characters. The maximum size of this control will be one (1) character. It will initially be blank.

A.3.1.18 Authorized Representative/Proxy 2 Last Name Text Box (Last)

The text box will be enabled when the Additional Info 2 sub-tab is active. The control will only accept entry of alpha and the following characters **(' , . -)**. The maximum size of this control will be twenty-five (25) characters. It will initially be blank.

A.3.1.19 Authorized Representative/Proxy 2 First Name Text Box (First)

The text box will be enabled when the Additional Info 2 sub-tab is active. The control will only accept entry of alpha and the following and the following characters **(' , . -)**. The maximum size of this control will be twenty (20) characters. It will initially be blank.

A.3.1.20 Authorized Representative/Proxy 2 Proxy Middle Initial Text Box (MI)

The text box will be enabled when the Additional Info 2 sub-tab is active. The control will only accept entry of alpha characters. The maximum size of this control will be one (1) character. It will initially be blank.

A.3.1.21 Application Date Text and Value Label

The value label will display when the Additional Info 2 sub-tab is active. The date will be in MM/DD/CCYY format. It will display in the inverse color of the form.

A.3.1.22 Termination Reason Text and Value Label

If the current certification has been terminated, the value label will display the text description of the termination reason from the reference dictionary table of the lookup database. If the current certification has not been terminated, the value label will display the text "N/A" for Not Applicable. The value label will display in the inverse color of the form.

A.3.1.23 Termination Date Text and Value Label

If the current certification has been terminated, the value label will display the termination date. The date will be in MM/DD/CCYY format. If the current certification has not been terminated, the value label will display the text "N/A" for Not Applicable. The value label will display in the inverse color of the form.

A.3.1.24 WIC Priority Text and Value Label

The value label will display the WIC priority of the participant. The value label will display in the inverse color of the form.

A.3.1.25 Ineligibility Reason Text and Value Label

If the applicant was found to be ineligible during the last certification attempt, the value label will display the text description of the ineligibility reason from the reference dictionary table of the lookup database. If the applicant was found to be eligible during the last certification attempt, the value label will display the text "N/A" for Not Applicable. The value label will display in the inverse color of the form.

A.3.1.26 Ineligibility Determined Date Text and Value Label

If the applicant was found to be ineligible during the last certification attempt, the value label will display the date on which the applicant was found to be ineligible. The date will be in MM/DD/CCYY format. If the applicant was found to be eligible during the last certification attempt, the value label will display the text "N/A" for Not Applicable. The value label will display in the inverse color of the form.

A.3.1.27 Waiting List Begin Date Text and Value Label

If the applicant was found to be on the Waiting List, the value label will display the date on which the applicant was placed on the Waiting List. The date will be in MM/DD/CCYY format. Otherwise, the value label will display the text "N/A" for Not Applicable. The value label will display in the inverse color of the form.

A.3.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Additional Info 2 sub-tab of the Demographics panels.

A.3.2.1 Initializing the Interface

If the panel is loaded for an Infant or a Child, the "Additional Information" Group label will display the text "Authorized Representative Additional Information".

If the panel is loaded for a Woman, the "Additional Information" Group label will display the text "Woman Additional Information".

A.3.2.2 Displaying the Data

All fields will display previously saved data as defined in the Demographic Information Data Map.

A.3.2.3 Edits (Additional Info 2 Sub-tab)

Edits for the controls are performed upon exit from the window, and are not performed when switching among the tabs of the folder on the window. The edits for the controls of each tab are described in the respective section for that folder tab.

As part of the edit process for the entire Demographics panels, the system will check that an entry is made in the following controls:

- Language 1 Dropdown
- Marital Status Dropdown
- Education Level Dropdown
- Authorized Representative Last Name text box
- Authorized Representative First Name text box

If the participant is 18 years old or older, the system will also check that an entry is made in the following controls:

- Register to Vote Dropdown

If an entry is not made in an above-listed control, the system will invoke a standard error message with the text "An entry is required for the {control label}".

A.3.2.4 Saving the Data (Participant Folder)

Upon successful completion of the above-listed edits, the system will save the values for all Demographic sub-tabs to the database (see <u>Demographic Information Data Map</u>). The system will also create an Authorized Representative/ Proxy history record for the participant in a database trigger.

A.3.2.5 Saving the Data (Certification Guided Script)

Upon successful completion of the above-listed edits, the system will save the values on the tabs of the Demographic Information dialog to the database. (see Demographic Information <u>Demographic Information Data Map</u>)

The GSControl.DemographicsEntered value is set to 'Y'

A.3.2.6 Assign Risk Factors

After the values on the Demographic sub-tabs are saved, if the *AssignRisksOutsideCert* business rule is active the system will invoke the Assign Risk Factors (Process) described in *Chapter 09 - Participant Folder*.

A.4 Demographic Information Data Map

The Demographic Information Data Map defines the values saved for all controls on the Demographics Panel including the Demographics sub-tab, Additional Info 1 sub-tab and Additional Info 2 sub-tab. If a business rule exists that changes the functionality or edit of a control it is also indicated here.

Control Label	Entity	Attribute	Business Rule
Last	Member	LastName	
First	Member	FirstName	
MI	Member	MiddleInitial	
Homeless	Household	Homeless	
Verified Date	Household	HomelessVerifiedDate	
Address	Household	Address	
Migrant	Household	Migrant	

Control Label	Entity	Attribute	Business Rule
County	Household County	County (where = County.CountyCd) Name	 X
City	Household LocalMunicipality	LocalMunicipality (where = LocalMunicipality.LocalMunicipalityID) Name	
ZIP	Household	ZIPCode	
Mailing Address	Household	MailAddress	
Mailing City	Household	MailCity	
Mailing State	Household	MailState	
Mailing ZIP	Household	MailZIP	
Residency Proof	Member ReferenceDictionary (where Category = 'RESIDPROOF')	ResidencyProof (where = ReferenceDictionary.ExternalID Description	
Telephone 1	Household	Telephone1	
Comment (1)	Household	Comment1	

Control Label	Entity	Attribute	Business Rule
ID Proof	Member	IdentificationProof (where = ReferenceDictionary.ExternalID	
	ReferenceDictionary (where Category = 'IDPRFCHILD' or 'IDPRFWOMAN' depending on WIC Category of participant)	Description If the WIC Category is Infant or Child, the ID Proof for a Child is used. If the WIC Category is Pregnant, Breastfeeding or Non-breastfeeding, the ID Proof for a Woman is used.	
Telephone 2	Household	Telephone2	
Comment (2)	Household	Comment2	
DOB	Member	DateOfBirth	
WIC Category	Member	WICStatus	
Gender	Member	Gender	
Race/ Ethnicity	Member	RaceEthnicity (where = ReferenceDictionary.ExternalID) / Description	
Tribe	Member	Tribe	Y
Last (Maiden Name)	Member	MaidenFirstName	

Control Label	Entity	Attribute	Business Rule
First (Maiden Name)	Member	MaidenLastName	
MI (Maiden Name)	Member	MaidenMiddleInitial	
Living with Foster Parent(s)	Child	FosterParents	
Physically Present	CertContact	PhysicallyPresent	X
Reason Not Present	CertContact	ReasonNotPresent	X
Service Site Assigned	Member/ ServiceSite	ServiceSiteID (where = ServiceSite.ServiceSiteID)/ ServiceSiteName	
Staff Member	Member/ UserProfile	UserProfileID (where = UserProfile.UserID)/ Name	
Household Smoking	Child	HouseholdSmoking	
TV/Video Viewing	Child	TVVideoViewing	
Local Question 1	MemberOtherInfo	LocalCaptionId1	
Local Question 2	MemberOtherInfo	LocalCaptionId2	

Control Label	Entity	Attribute	Business Rule
Local Question 3	MemberOtherInfo	LocalCaptionId3	
Local Question 4	MemberOtherInfo	LocalCaptionId4	
Local Question 5	MemberOtherInfo	LocalCaptionId5	
Local Question 6	MemberOtherInfo	LocalCaptionId6	
Local Answer 1	MemberOtherInfo	LocalValueId1	
Local Answer 2	MemberOtherInfo	LocalValueId2	
Local Answer 3	MemberOtherInfo	LocalValueId3	
Local Answer 4	MemberOtherInfo	LocalValueId4	
Local Answer 5	MemberOtherInfo	LocalValueId5	
Local Answer 6	MemberOtherInfo	LocalValueId6	
State Question 1	MemberOtherInfo	StateCaptionId1	
State Question 2	MemberOtherInfo	StateCaptionId2	
State Question 3	MemberOtherInfo	StateCaptionId3	
State Question 4	MemberOtherInfo	StateCaptionId4	
State Question 5	MemberOtherInfo	StateCaptionId5	

Control Label	Entity	Attribute	Business Rule
State Question 6	MemberOtherInfo	StateCaptionId6	
State Answer 1	MemberOtherInfo	StateValueId1	
State Answer 2	MemberOtherInfo	StateValueId2	
State Answer 3	MemberOtherInfo	StateValueId3	
State Answer 4	MemberOtherInfo	StateValueId4	
State Answer 5	MemberOtherInfo	StateValueId5	
State Answer 6	MemberOtherInfo	StateValueId6	
How Heard about WIC	Household	HowHeardAboutWIC	
Hardship	Member	Hardship1 Hardship2 Hardship3 Hardship4 Hardship5 Hardship6	
Disability	Member	Disability	

Control Label	Entity	Attribute	Business Rule
Insurance Type	Member/	InsuranceType (where = ReferenceDictionary.ExternalID) /	
	ReferenceDictionary (where Category = 'INSTYPE')	Description	
Type of Medical Home	Member/	MedicalHomeType (where = ReferenceDictionary.ExternalID) /	
	ReferenceDictionary (where Category = 'MEDHOMETYPE')	Description	X
Medical Home	Member/	MedicalHomeID (where = MedicalHome.MedicalHomeID)/	X
	MedicalHome	MedicalHomeName	
Correspondence Preference	Household	LanguagePreference	
Language 1	Household	Language1	
Read (1)	Household	Language1Read	
Spoken (1)	Household	Language1Spoken	
Language (2)	Household	Language2	
Read (2)	Household	Language2Read	

Control Label	Entity	Attribute	Business Rule
Spoken (2)	Household	Language2Spoken	
Need Interpreter	Household	InterpreterNeeded	
Marital Status	Member/ ReferenceDictionary (where Category = 'MARITALSTS')	MaritalStatus (where = ReferenceDictionary.ExternalID/ Description	
Education Level	Member/ ReferenceDictionary (where Category = 'EDULEVEL')	EducationLevel (where = ReferenceDictionary.ExternalID/ Description	
Register to Vote	Member/ ReferenceDictionary (where Category = 'REGISTERTOVOT E')	RegisterToVote (where = ReferenceDictionary.ExternalID/ Description	
Last (Authorized Representativ e Name)	Member	AuthorizedRepLastName	
First (Authorized Representativ e Name)	Member	AuthorizedRepFirstName	

Control Label	Entity	Attribute	Business Rule
MI (Authorized Representative Name)	Member	AuthorizedRepMiddleInitial	
Last (Authorized Representative/ Proxy 1 Name)	Member	AltAuthRepLastName	
First (Authorized Representative/ Proxy 1 Name)	Member	AltAuthRepFirstName	
MI (Authorized Representative/ Proxy 1 Name)	Member	AltAuthRepMiddleInitial	
Last (Authorized Representative/ Proxy 2 Name)	Member	ProxyLastName	
First (Authorized Representative/ Proxy 2 Name)	Member	ProxyFirstName	
MI (Authorized Representative/ Proxy 2 Name)	Member	ProxyMiddleInitial	
Application Date	Member	ApplicationDate	

Control Label	Entity	Attribute	Business Rule
Termination Reason	CertContact ReferenceDictionary (where Category = 'TERMREASON'	CertTermReason (where = ReferenceDictionary.ExternalID) Description	
Termination Date	Member or CertContact	TerminatedDate or CertTermDate	
WIC Priority	CertContact	CertAssignedPriority	
Ineligibility Reason	CertContact	CertIneligibleReason	
Ineligibility Determined Date	CertContact	CertIneligibleDate	
Waiting List Begin Date	Member	WaitListBeginDate	

A.5 Copy Demographics from Another Household Member

The Copy Demographics from Another Household Member dialog allows the user to copy some of the demographics information from another household member to the current participant. It is invoked in response to selecting the Copy Demographics button on the Demographics sub-tab.

Figure 9 – Copy Demographics from Another Household Member

A.5.1 Controls

A.5.1.1 Household Members Display Grid

The display grid will be enabled when the Copy Demographics from Another Household Member dialog is active. It consists of the following columns:

- Name
- WIC Category

- Age

For a participant who is a woman with a WIC Category of Pregnant, the Age column will contain the weeks of gestation.

A.5.1.2 Insurance Type Text and Value Label

The value label will display when the Copy Demographics from Another Household Member dialog is active. It will display the Insurance Type description taken from the ReferenceDictionary.Description where the ReferenceDictionary.Category equals 'INSTYPE' and the ReferenceDictionary.ExternalID equals Member.InsuranceType for the selected Member.StateWICID. The value label will display in the inverse color of the form.

A.5.1.3 Medical Home Text and Value Label

The value label will display when the Copy Demographics from Another Household Member dialog is active and the State Business Rule CAPTUREMEDHOME equals 'Y'. It will display the MedicalHome.MedicalHomeName where the MedicalHome.MedicalHomeID equals Member.MedicalHomeID for the selected Member.StateWICID. The value label will display in the inverse color of the form.

A.5.1.4 Language Text and Value Label

The value label will display when the Copy Demographics from Another Household Member dialog is active. It will display the Language description taken from the ReferenceDictionary.Description where the ReferenceDictionary.Category equals 'LANGUAGE' and the ReferenceDictionary.ExternalID equals Member.Language for the selected Member.StateWICID. The value label will display in the inverse color of the form.

A.5.1.5 Marital Status Text and Value Label

The value label will display when the Copy Demographics from Another Household Member dialog is active. It will display the Member.MaritalStatus for the selected Member.StateWICID. The value label will display in the inverse color of the form.

A.5.1.6 Education Level Text and Value Label

The value label will display when the Copy Demographics from Another Household Member dialog is active. It will display Member.EducationLevel for the selected Member.StateWICID. The value label will display in the inverse color of the form.

A.5.1.7 Authorized Representative Name Text and Value Label

The value label will display when the Copy Demographics from Another Household Member dialog is active. It will display the Member.AuthRepFirstName Member.AuthRepMiddleInitial Member.AuthRepLastName for the selected Member.StateWICID. The value label will display in the inverse color of the form.

A.5.1.8 Alt. Representative/Proxy 1 Name Text and Value Label

The value label will display when the Copy Demographics from Another Household Member dialog is active. It will display the Member.AltAuthRepFirstName Member.AltAuthRepMiddleInitial Member.AltAuthRepLastName for the selected Member.StateWICID. The value label will display in the inverse color of the form.

A.5.1.9 Alt. Representative/Proxy 2 Name Text and Value Label

The value label will display when the Copy Demographics from Another Household Member dialog is active. It will display the Member.ProxyFirstName Member.ProxyMiddleInitial Member.ProxyLastName for the selected Member.StateWICID. The value label will display in the inverse color of the form.

A.5.1.10 Replace Existing Information Check Box

The check box will be enabled when the Copy Demographics from Another Household Member dialog is active.

A.5.1.11 OK Button

The OK button will be enabled when the Copy Demographics from Another Household Member dialog is active. (See *Saving the Data* in the Processing section below) Characteristics for the OK button are defined in *Consistencies*

A.5.1.12 Cancel Button

The Cancel button will be enabled when the Copy Demographics from Another Household Member dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

A.5.2 Processes

A.5.2.1 Initializing the Interface

The Household Members display grid displays the Name, WIC Category and Age for each member associated with the Member.HouseholdID of the selected Member.StateWICID. (WIC Category of Pregnant, the Age column will contain the weeks of gestation)

The Household Members display grid will not display a record for the current participant.

The Household Members display grid is ordered oldest to youngest.

The Household Members display grid will initially select the first record (the oldest household member) displayed in the grid.

The Insurance Type value initially displays Insurance Type for the selected StateWICID

The Medical Home value initially displays the Medical Home for the selected StateWICID

The Marital Status value initially displays the Marital Status for the selected StateWICID.

The Education Level value initially displays the Education Level for the selected StateWICID.

The Authorized Rep Name value initially displays the Authorized Representative First Name Middle Initial Last Name for the selected StateWICID.

The Alt. Authorized Rep. Name value initially displays the Alternate Authorized Representative First Name Middle Initial Last Name for the selected StateWICID.

The Proxy Name value initially displays the Proxy First Name Middle Initial Last Name for the selected StateWICID.

The Replace Existing Information Check box is initially blank.

A.5.2.2 Edits

Upon selection of the OK button:

If a selection has not been made in the Household Members display grid, the system will invoke a standard error message with the text "A selection is required in the {control label}".

A.5.2.3 Saving the Data

Upon successful completion of the above-listed edits, the system will copy the displayed demographic information from the selected household member to the current participant.

If the Replace Existing Information check box is not marked, then whatever information is available on the selected household member will be copied to the current participant but only if the information does not already exist.

If the Replace Existing Information check box is marked, then whatever information is available on the selected household member will be copied to the current participant even if the information already exists.

A.5.2.4 Assign Risk Factors

After the values on the Demographic sub-tabs are saved, if the *AssignRisksOutsideCert* business rule is active the system will invoke the Assign Risk Factors (Process) described in *Chapter 09 - Participant Folder*.

A.6 Race/Ethnicity

The Race/Ethnicity dialog allows the user to select the Race/Ethnicity of the participant. It is invoked in response to selecting the Race/Ethnicity button on the Demographics sub-tab.
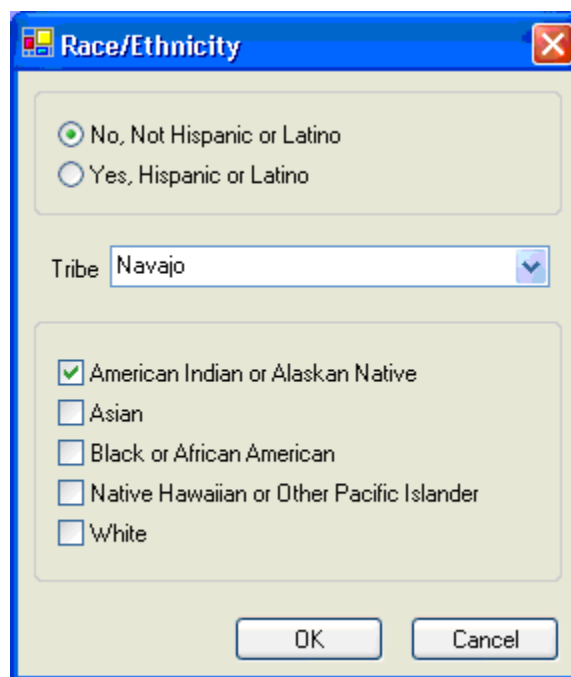

Figure 10 – Race/Ethnicity Dialog

A.6.1 Controls

A.6.1.1 Ethnicity Source Radio Button Group

The Ethnicity Source radio button group will be enabled when the Race/Ethnicity dialog is enabled. The radio button group consists of the following:

- No, Not Hispanic or Latino
- Yes, Hispanic or Latino

It will default to "No, Not Hispanic or Latino."

A.6.1.2 Tribe Dropdown

The Tribe dropdown will be enabled when the Race/Ethnicity dialog is active and a selection is made in the American Indian or Alaskan Native check box and the 'CaptureTribe' business rule is active. It will display all Tribes listed in the Tribes entity. It will display in alphabetical order.

A.6.1.3 Race Check Box Group

The Race check box group button group consists of the following:

- American Indian or Alaskan Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White

A.6.1.4 OK Button

The OK button will be visible and enabled when the Race/Ethnicity dialog is active in add or edit mode for the Clinic application.   (See *Saving the Data* in the Processing section below.) The OK button is not visible when the dialog is displayed in view mode from either the State Office or Central Administrative Site application. Characteristics for the OK button are defined in *Consistencies*.

A.6.1.5 Cancel Button

The Cancel button will be visible and enabled when the Race/Ethnicity dialog is active in add or edit mode for the Clinic application. The Cancel button is not visible when the dialog is displayed in view mode from either the State Office or Central Administrative Site application. Characteristics for the Cancel button are defined in *Consistencies*.

A.6.1.6 Close Button

The Close button will be visible and enabled when the Race/Ethnicity dialog is active after being invoked from either the State Office or Central Administrative Site application in view mode. The Close button will not be visible when the Race/Ethnicity dialog is displayed in add or edit mode from the Clinic application. Characteristics for the Close button are defined in *Consistencies*.

A.6.2 Processes

A.6.2.1 Initializing the Interface

The title bar text will be set to "Race/Ethnicity"

The Ethnicity Source radio button group will default to "No, Not Hispanic or Latino

The American Indian or Alaskan Native will be initially selected

Tribe dropdown will be enabled.

A.6.2.2 Edits

Upon selection of the OK button, the system will verify one of the Ethnicity Source radio buttons has been selected.

If a selection is not made in the above control the system will invoke a standard error message for a text box with the text "A selection is required for the {control label}"

The system will verify there is at least one of the Race check boxes has been selected.

If a selection is not made in least one of the Race check boxes the system will invoke a standard error message for a text box with the text "You must select at least one race."

A.6.2.3 Saving the Data

Upon successful completion of the above-listed edits the system will save the data to the RaceEthnicity attribute of the MEMBER entity.